

Lee County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information



August 2009

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EXECUTIVE SUMMARY

Population

Lee County's population growth has been slower than the state's in recent years.

Future growth is expected to be slower as well.

Not quite half of Lee County's workers live within the county.

Over 10% of Lee County's workers come from Sumter County.

Income

Per capita income growth has been faster than the state but slower than the nation.

However, Lee County's per capita income remained below state and national levels from 1997 to 2007.

Lee County's average wages are higher than the state's for these occupational groups: community and social services, farming and forestry, production, and transportation and material moving.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the area of business management.

Occupations

The following occupational groups are expected to have faster growth in Lee County than in the state:

Business and financial operations; computer and mathematical science; architecture and engineering; life, physical and social science; arts, design, entertainment, sports and media; healthcare practitioners and technical; protective service; food preparation and serving related; building and grounds cleaning and maintenance; personal care and service; office and administrative support; farming and forestry; construction and extraction; installation, maintenance and repair; production; and transportation and material moving.

Requirements for Lee County's workers are expected to grow in the following levels of education and experience:

Short-term on-the-job training, work experience in a related field, postsecondary vocational award, and degree plus work experience.

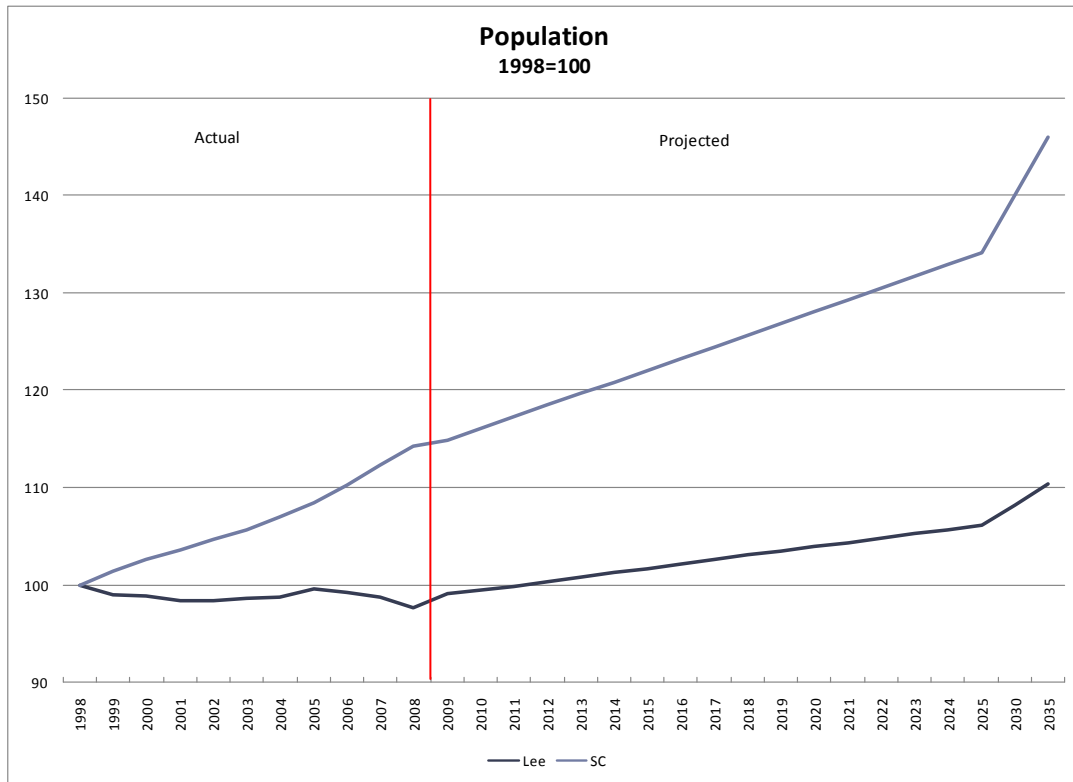
Industry

Based on available data, a sector rated as having high potential in Lee County is truck transportation.

POPULATION

Growth

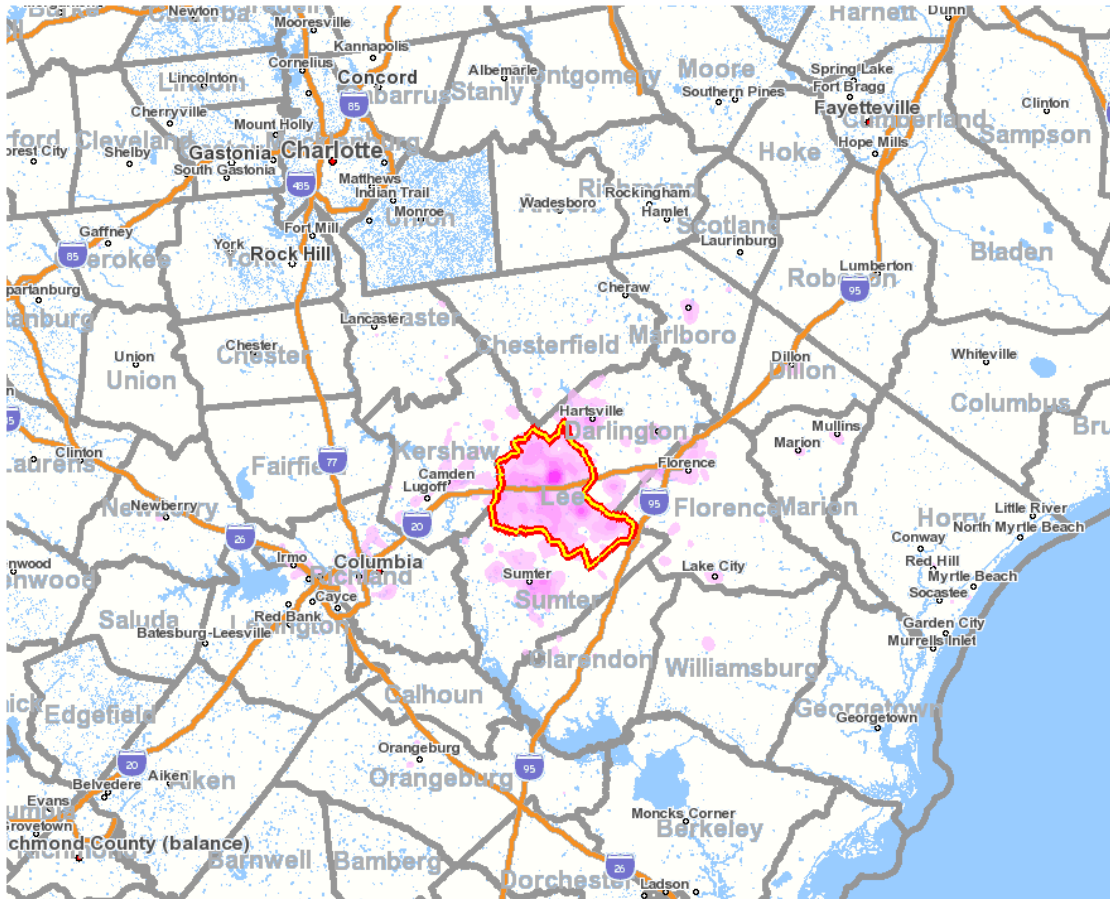
Lee County's 2008 population was 19,891. The county population has dropped by 2.4% since 1998, compared to 14.3% growth for South Carolina. Lee's future population growth is expected to be slower than the state's.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Lee County workers come from (in 2006, latest available data). As can be seen, Lee County draws workers mainly from nearby areas.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

Age of Workers:

30 or younger	19.2%
31 to 54	60.8%
55 or older	10.0%

Earnings of Workers:

\$1,200 per month or less	34.2%
\$1,201 to \$3,400 per month	47.4%
More than \$3,400 per month	18.4%

States Where Workers Live:

South Carolina	98.9%
North Carolina	0.7%
All other locations	0.4%

Counties Where Workers Live:

Lee	46.6%
Sumter	10.3%
Darlington	8.3%
Kershaw	6.0%
Florence	5.8%
Richland	4.7%
Marlboro	1.5%
Lexington	1.4%
Horry	1.1%
Clarendon	1.1%
All Other Locations	13.1%

Cities Where Workers Live:

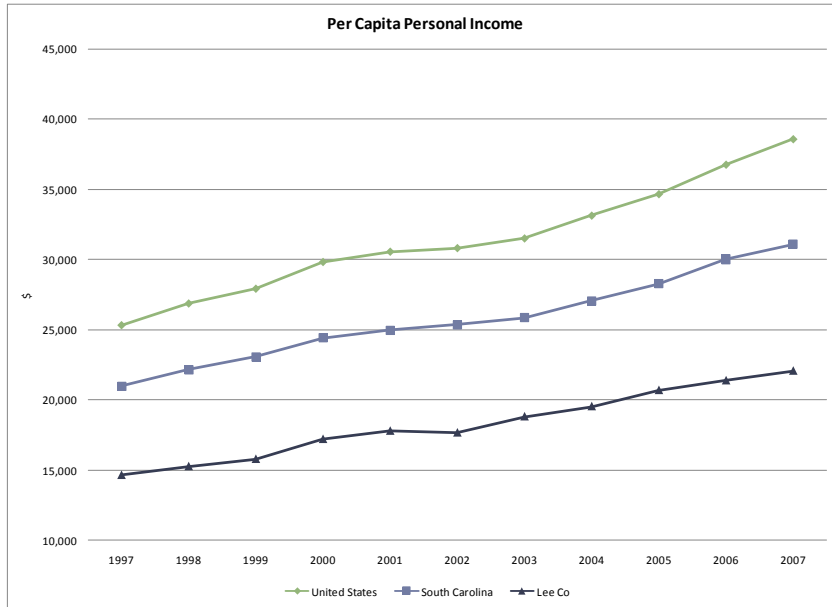
Bishopville, SC	11.5%
Sumter, SC	3.8%
Hartsville, SC	1.5%
Florence, SC	1.1%
Lynchburg, SC	0.8%
Columbia, SC	0.7%
Dentsville, SC	0.6%
Bennettsville, SC	0.6%
St. Andrews, SC	0.5%
Charleston, SC	0.5%
All Other Locations	78.4%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

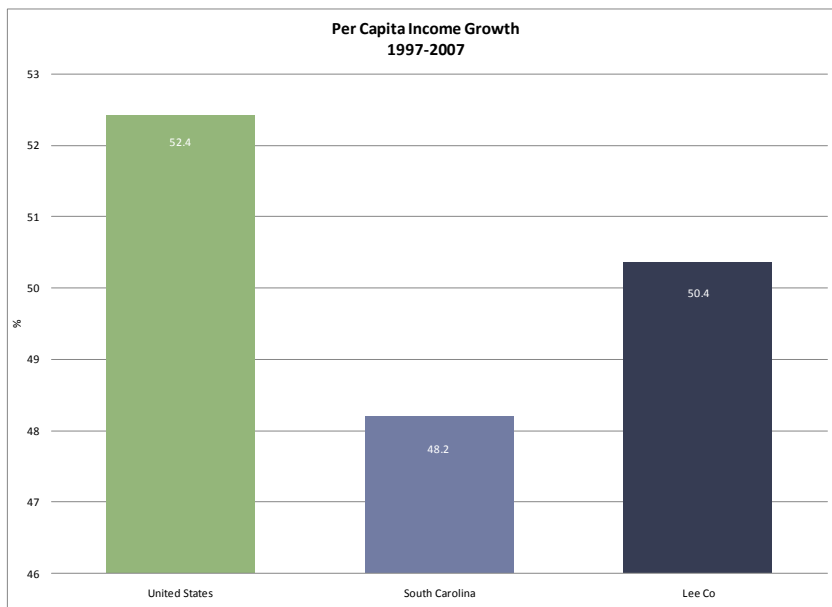
Per Capita Income

Lee County's per capita income has consistently been well below state and national levels.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Lee County's per capita income has grown faster than South Carolina's but slower than the nation's.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Lee County's average wages are well below those of South Carolina (\$570 vs. \$697 in 2008). Average wages were up 25% in Lee County over the past five years, compared to 18% for the state. All major sectors had growth except for transportation and warehousing.

Industry	NAICS Code	2008 Average Weekly Wage (\$)	2003 Average Weekly Wage (\$)	% Change
Total, Private and Government		570	457	25
Construction	23	378	303	25
Manufacturing	31-33	871	844	3
Retail Trade	44-45	407	296	38
Transportation and Warehousing	48-49	500	550	-9
Finance and Insurance	52	592	502	18
Real Estate and Rental and Leasing	53	352	253	39
Administration & Support & Waste Management & Remediation Services	56	595	439	36
Other Services (Except Public Administration)	81	266	232	15
Federal Government		861	646	33
State Government		653	553	18
Local Government		571	457	25

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Lee County are higher than the state average in the following occupational groups:

- Community and social services
- Farming and forestry
- Production
- Transportation and material moving

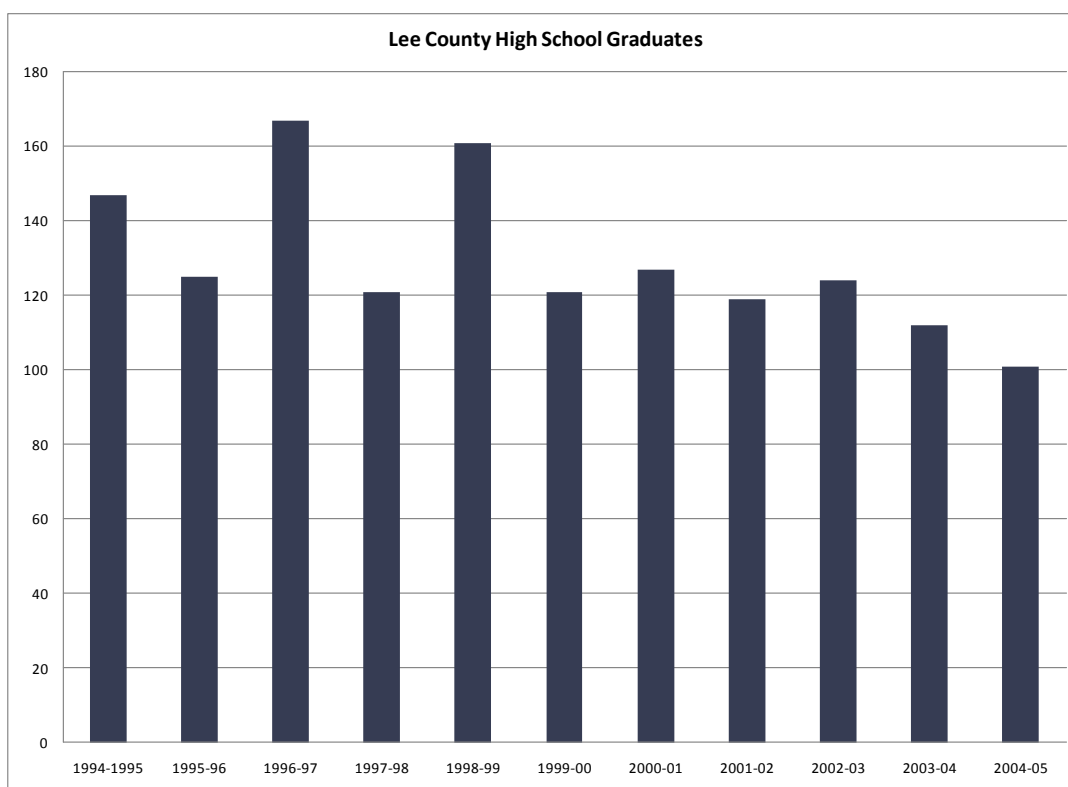
Occupation	2009 Lee County Median Hourly Wage (\$)	2009 SC Median Hourly Wage (\$)
Management occupations	12.28	23.49
Business and financial operations occupations	12.78	19.14
Computer and mathematical science occupations	15.79	25.83
Architecture and engineering occupations	22.02	28.98
Life, physical and social science occupations	14.20	21.12
Community and social services occupations	14.41	12.94
Legal occupations	11.53	25.39
Education, training and library occupations	17.12	22.66
Arts, design, entertainment, sports and media occupations	10.11	12.27
Healthcare practitioners and technical occupations	27.20	28.56
Healthcare support occupations	9.46	10.74
Protective service occupations	13.55	14.37
Food preparation and serving related occupations	7.96	8.18
Building and grounds cleaning and maintenance occupations	7.56	8.75
Personal care and service occupations	6.92	8.41
Sales and related occupations	9.04	11.00
Office and administrative support occupations	12.09	13.06
Farming, fishing, and forestry occupations	10.89	10.85
Construction and extraction occupations	10.05	14.10
Installation, maintenance and repair occupations	13.06	16.19
Production occupations	17.23	14.75
Transportation and material moving occupations	13.24	12.65

Source: Economic Modeling Specialists, Inc.

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Lee County students receiving high school diplomas fell by 46 (31%). In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 101 people received high school diplomas in Lee County in 2005. Lee County had 62 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of Lee County students not passing the exit exam who received a certificate of completion instead of a diploma increased by 14 (to 24) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 1,400 more students graduated from higher educational institutions in the Santee-Lynches area in 2007 than in 1997, an increase of 14%. The greatest numerical increase was in business management fields.

Program	1997	2007	Change	% Change
Agriculture, agriculture operations, and related sciences	16	-	-	-
Area, ethnic, cultural, and gender studies	10	25	15	150
Biological and biomedical sciences	462	481	19	4
Business, management, marketing, and related support services	1,614	2,192	578	36
Communication, journalism, and related programs	239	468	229	96
Computer and information sciences and support services	147	202	55	37
Construction trades	4	10	6	150
Education	1,284	1,262	-22	-2
Engineering technologies/technicians	154	163	9	6
Engineering	294	319	25	9
English language and literature/letters	285	233	-52	-18
Family and consumer sciences/human sciences	122	310	188	154
Foreign languages, literatures, and linguistics	83	70	-13	-16
Health professions and related clinical sciences	1,260	1,389	129	10
Social sciences and history	675	780	105	16
Legal professions and studies	308	303	-5	-2
Liberal arts and sciences, general studies and humanities	675	425	-250	-37
Library science	192	183	-9	-5
Mathematics and statistics	120	115	-5	-4
Mechanic and repair technologies/technicians	113	201	88	78
Multi/interdisciplinary studies	44	87	43	98
Natural resources and conservation	22	10	-12	-55
Parks, recreation, leisure, and fitness studies	164	288	124	76
Personal and culinary services	7	37	30	429
Philosophy and religious studies	32	57	25	78
Physical sciences	172	134	-38	-22
Precision production	88	117	29	33
Psychology	398	416	18	5
Public administration and social service professions	367	379	12	3
Science technologies/technicians	4	-	-	-
Security and protective services	368	380	12	3
Theology and religious vocations	312	310	-2	-1
Visual and performing arts	224	355	131	58
TOTAL	10,259	11,701	1,442	14

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Allen University, Benedict College, Central Carolina Technical College, Claflin University, Coker College, Columbia College, Columbia International University, Florence-Darlington Technical College, Francis Marion University, Lutheran Theological Seminary, McLeod Regional Medical Center School of Medical Technology, Morris College, Northeastern Technical College, Orangeburg-Calhoun Technical College, South Carolina State University, South University, Southern Methodist College, University of South Carolina-Columbia, University of South Carolina-Lancaster, University of South Carolina-Sumter, Williamsburg Technical College.

OCCUPATIONS

Occupational Projections

The following occupational groups are projected to grow faster in Lee County than in the state:

- Business and financial operations
- Computer and mathematical science
- Architecture and engineering
- Life, physical and social science
- Arts, design, entertainment, sports and media
- Healthcare practitioners and technical
- Protective service
- Food preparation and serving related
- Building and grounds cleaning and maintenance
- Personal care and service
- Office and administrative support
- Farming and forestry
- Construction and extraction
- Installation, maintenance and repair
- Production
- Transportation and material moving

See **Appendix A** for detailed occupational information.

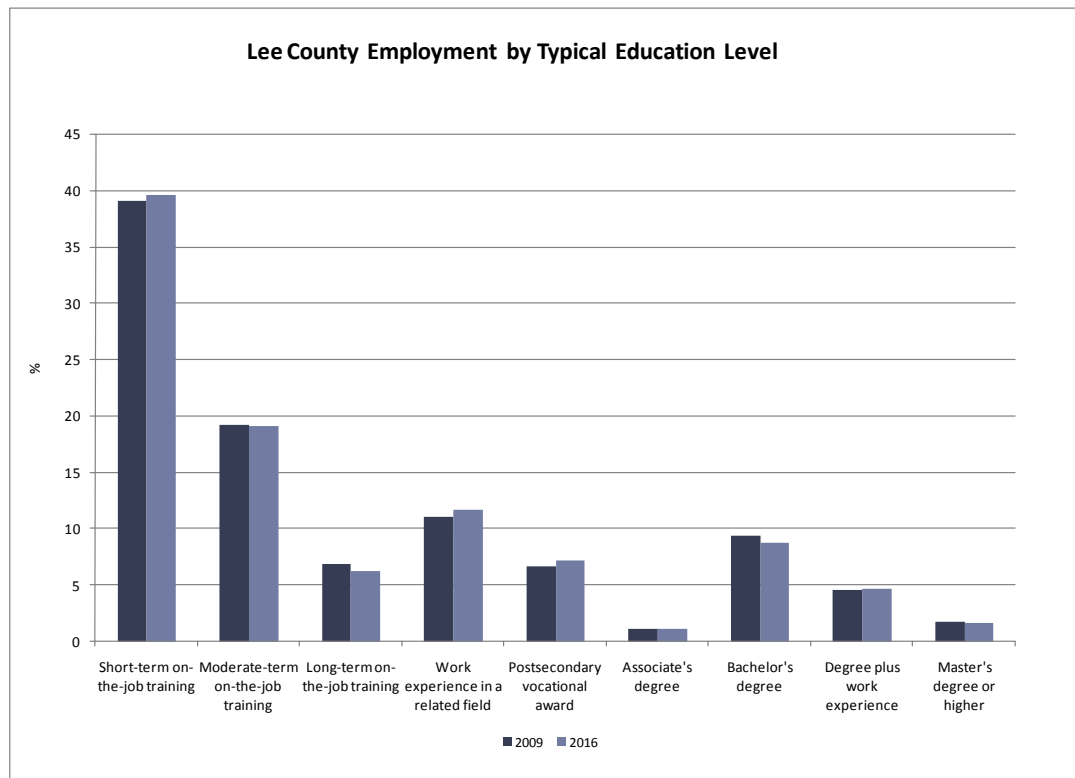
Occupation	2009-2016 Lee County Projected Growth (%)	2009-2016 SC Projected Growth (%)
Management occupations	12	13
Business and financial operations occupations	22	15
Computer and mathematical science occupations	25	15
Architecture and engineering occupations	33	11
Life, physical and social science occupations	26	10
Community and social services occupations	3	9
Legal occupations	11	17
Education, training and library occupations	6	10
Arts, design, entertainment, sports and media occupations	16	13
Healthcare practitioners and technical occupations	18	17
Healthcare support occupations	13	20
Protective service occupations	17	10
Food preparation and serving related occupations	15	9
Building and grounds cleaning and maintenance occupations	34	18
Personal care and service occupations	16	6
Sales and related occupations	15	16
Office and administrative support occupations	12	8
Farming, fishing and forestry occupations	13	6
Construction and extraction occupations	31	12
Installation, maintenance and repair occupations	21	12
Production occupations	19	-1
Transportation and material moving occupations	18	7

Source: *Economic Modeling Specialists, Inc.*

Occupational Education Requirements

The trend for occupational growth shows that there will be growth in jobs across skill levels. Based on employment projections, Lee County is expected to see growth in requirements for the following specific levels of education and experience:

- Short-term on-the-job training
- Work experience in a related field
- Postsecondary vocational award
- Degree plus work experience



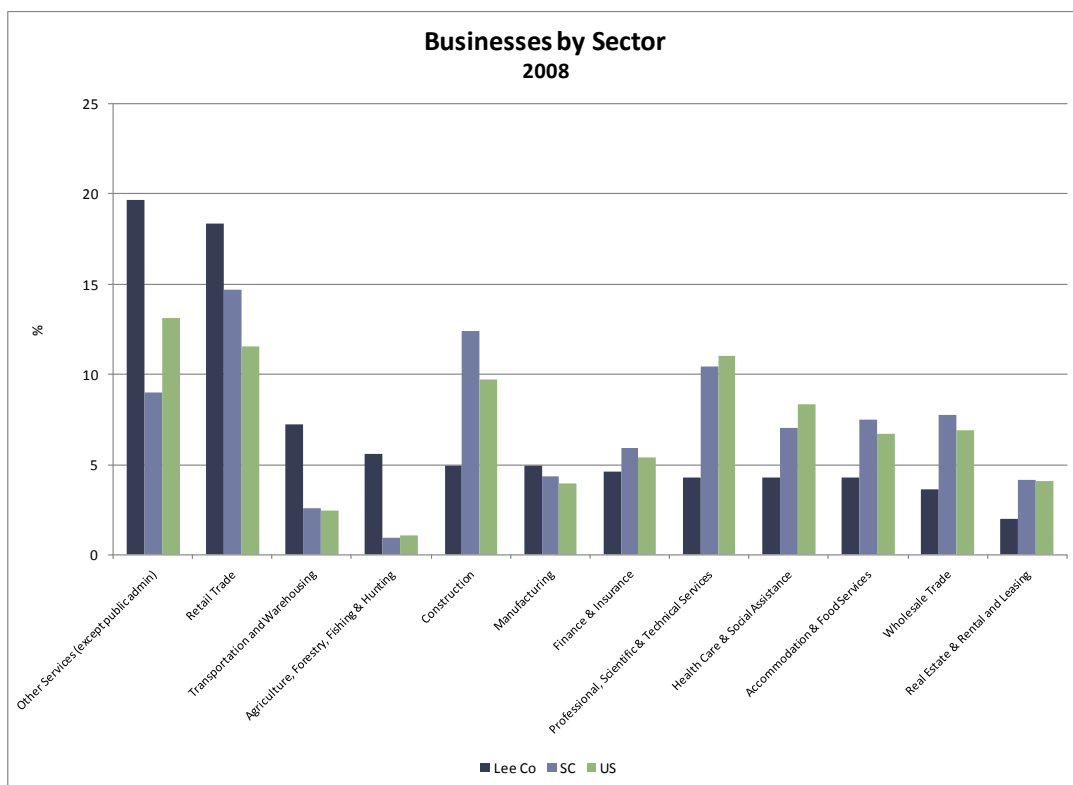
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Lee County had higher percentages of businesses than South Carolina and the nation in the following sectors:

- Other services
- Retail trade
- Transportation and warehousing
- Agriculture and forestry
- Manufacturing



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Lee County fell by 3% from 2002 to 2007, compared to a 3% increase for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, based on available data, Lee County had higher growth in four industries compared to South Carolina and the U.S. Below is a list of those four industries along with their respective growth rates.

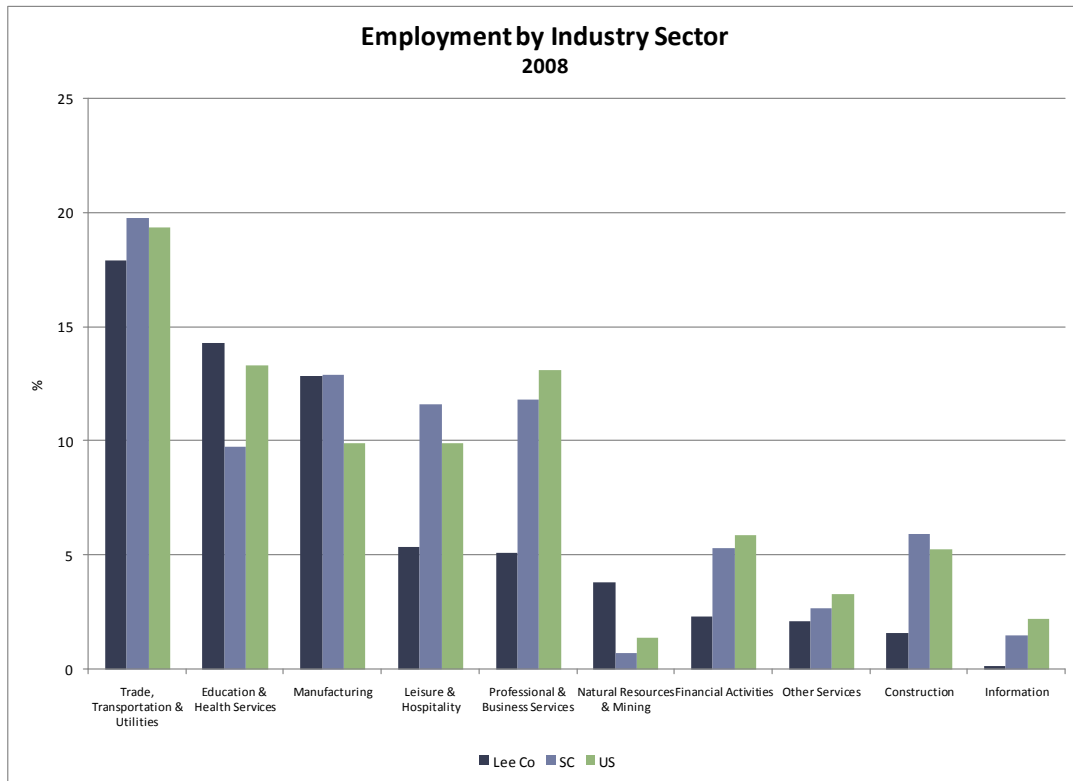
See **Appendix B** for information on all industries.

Industry	2003-2008 Growth (%)		
	Lee Co.	SC	US
Building Material and Garden Equipment and Supplies Dealers	40.0	-5.4	1.2
Truck Transportation	7.1	-1.6	5.2
Repair and maintenance	33.3	-13.2	-0.9
Private Households	168.8	21.2	22.1

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Lee County has a larger than average share of its jobs in education and health services and natural resources and mining. Trade, transportation and utilities is the county's largest employment sector.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2003-2008 employment growth | Competitive effect ¹ |
| • 2003-2008 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2003-2008 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2003-2008 employment growth rate greater than 0% (the county lost jobs over the period) (Did the sector add jobs?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in the county?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$29,637 (2008 average for the county) (Does the sector pay wages greater than average for the county?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Lee. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Lee County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria and available data, there are no “six star” sectors in Lee County. “Five star” sectors for the county are building material and garden equipment and supplies dealers and health care and personal care stores.

Industry sectors that generate wealth from outside the area are referred to as the region’s base economy. Base economy sectors are important to an area’s economic well-being. The sectors listed above serve the local population and do not bring wealth into the area.

A sector which fits this base economy criteria, has above-average wages, has a high concentration in the area (as indicated by the location quotient), and is projected to grow is truck transportation.

Appendix C has information on all factors for all sectors for Lee County.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county compared to the US; based on 2008 data.*

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Lee County's labor market. We hope that it will help in advancing the progress of Lee County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Lee Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Lee's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Lee and its community?*

Over and above pure economic considerations, what is important to the citizens of the Lee community? How does Lee want to be perceived? What quality of life issues affect Lee? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Lee County

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-1011	Chief executives	52	65	13	25	1.31	17.35	Degree plus work experience
11-1021	General and operations managers	36	39	3	8	0.57	29.21	Degree plus work experience
11-9011	Farm, ranch, and other agricultural managers	85	95	10	12	4.47	12.45	Degree plus work experience
11-9012	Farmers and ranchers	225	218	-7	-3	3.75	6.55	Long-term on-the-job training
11-9021	Construction managers	21	28	7	33	0.83	7.47	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	14	15	1	7	1.54	39.27	Degree plus work experience
11-9051	Food service managers	28	35	7	25	1.78	7.73	Work experience in a related field
11-9081	Lodging managers	18	26	8	44	3.60	11.60	Work experience in a related field
11-9111	Medical and health services managers	16	18	2	13	1.37	21.69	Degree plus work experience
11-9141	Property, real estate, and community association managers	31	42	11	35	0.73	6.76	Bachelor's degree
11-9199	Managers, all other	68	86	18	26	1.19	8.06	Work experience in a related field

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
13-1111	Management analysts	23	33	10	43	0.64	14.95	Degree plus work experience
13-2011	Accountants and auditors	35	41	6	17	0.64	11.67	Bachelor's degree
13-2021	Appraisers and assessors of real estate	12	16	4	33	0.79	7.40	Postsecondary vocational award
21-1012	Educational, vocational, and school counselors	17	18	1	6	1.69	24.04	Master's degree
21-1021	Child, family, and school social workers	28	30	2	7	2.56	15.15	Bachelor's degree
21-1023	Mental health and substance abuse social workers	21	19	-2	-10	3.89	10.98	Master's degree
21-1029	Social workers, all other	12	12	0	0	3.85	16.46	Bachelor's degree
23-1011	Lawyers	11	12	1	9	0.38	13.03	First professional degree
25-1099	Postsecondary teachers	15	18	3	20	0.24	31.27	Doctoral degree
25-2011	Preschool teachers, except special education	18	20	2	11	0.90	10.38	Postsecondary vocational award
25-2012	Kindergarten teachers, except special education	23	25	2	9	3.10	19.87	Bachelor's degree
25-2021	Elementary school teachers, except special education	94	102	8	9	1.62	21.32	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	45	48	3	7	1.80	21.02	Bachelor's degree
25-2031	Secondary school teachers, except special and vocational education	63	64	1	2	1.58	24.25	Bachelor's degree
25-3099	Teachers and instructors, all other	62	66	4	6	2.60	8.98	Bachelor's degree

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
25-9041	Teacher assistants	86	89	3	3	1.69	8.80	Short-term on-the-job training
27-4021	Photographers	17	16	-1	-6	0.66	10.72	Long-term on-the-job training
29-1069	Physicians and surgeons	24	25	1	4	0.79	76.71	First professional degree
29-1111	Registered nurses	57	66	9	16	0.62	29.39	Associate's degree
29-2052	Pharmacy technicians	13	16	3	23	1.10	10.98	Moderate-term on-the-job training
29-2061	Licensed practical and licensed vocational nurses	66	82	16	24	2.53	18.70	Postsecondary vocational award
31-1011	Home health aides	73	66	-7	-10	2.04	9.52	Short-term on-the-job training
31-1012	Nursing aides, orderlies, and attendants	107	135	28	26	1.98	8.56	Postsecondary vocational award
31-9092	Medical assistants	13	16	3	23	0.74	14.61	Moderate-term on-the-job training
33-3012	Correctional officers and jailers	175	203	28	16	12.21	14.10	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	32	35	3	9	1.42	13.66	Long-term on-the-job training

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
33-9032	Security guards	17	25	8	47	0.46	8.33	Short-term on-the-job training
35-1012	First-line supervisors/managers of food preparation and serving workers	42	49	7	17	1.34	10.54	Work experience in a related field
35-2011	Cooks, fast food	35	40	5	14	1.75	7.91	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	30	33	3	10	2.12	7.05	Moderate-term on-the-job training
35-2021	Food preparation workers	21	23	2	10	0.64	8.16	Short-term on-the-job training
35-3011	Bartenders	10	12	2	20	0.56	6.55	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	114	139	25	22	1.19	7.74	Short-term on-the-job training
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	16	22	6	38	1.12	8.98	Work experience in a related field
37-1012	First-line supervisors/managers of landscaping, lawn service, and groundskeeping workers	14	19	5	36	2.60	10.19	Work experience in a related field
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	62	70	8	13	0.77	8.89	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	217	292	75	35	2.91	6.74	Short-term on-the-job training

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
37-2019	Building cleaning workers, all other	29	42	13	45	1.46	6.56	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	45	62	17	38	1.25	9.44	Short-term on-the-job training
37-3012	Pesticide handlers, sprayers, and applicators, vegetation	15	22	7	47	3.93	7.26	Moderate-term on-the-job training
37-3013	Tree trimmers and pruners	16	23	7	44	3.73	7.34	Short-term on-the-job training
37-3019	Grounds maintenance workers, all other	14	21	7	50	3.98	6.85	Short-term on-the-job training
39-2021	Nonfarm animal caretakers	19	17	-2	-11	1.48	6.55	Short-term on-the-job training
39-9011	Child care workers	150	193	43	29	2.21	6.55	Short-term on-the-job training
39-9021	Personal and home care aides	59	73	14	24	1.81	6.91	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	147	169	22	15	1.88	11.95	Work experience in a related field
41-1012	First-line supervisors/managers of non-retail sales workers	34	41	7	21	1.07	9.78	Work experience in a related field
41-2011	Cashiers, except gaming	183	193	10	5	1.47	7.44	Short-term on-the-job training

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
41-2031	Retail salespersons	98	109	11	11	0.56	8.83	Short-term on-the-job training
41-3021	Insurance sales agents	43	45	2	5	1.71	8.49	Bachelor's degree
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	25	26	1	4	0.45	16.01	Moderate-term on-the-job training
41-9021	Real estate brokers	54	72	18	33	0.85	6.84	Work experience in a related field
41-9022	Real estate sales agents	56	75	19	34	0.83	6.73	Postsecondary vocational award
41-9091	Door-to-door sales workers, news and street vendors, and related workers	35	40	5	14	0.99	6.55	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	48	54	6	13	0.87	16.50	Work experience in a related field
43-3021	Billing and posting clerks and machine operators	13	14	1	8	0.70	13.67	Moderate-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	62	72	10	16	0.80	11.18	Moderate-term on-the-job training
43-3071	Tellers	18	21	3	17	0.81	8.83	Short-term on-the-job training
43-4051	Customer service representatives	32	40	8	25	0.40	10.39	Moderate-term on-the-job training

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-4111	Interviewers, except eligibility and loan	10	11	1	10	1.16	10.95	Short-term on-the-job training
43-4171	Receptionists and information clerks	22	26	4	18	0.53	11.27	Short-term on-the-job training
43-5052	Postal service mail carriers	16	18	2	13	1.34	21.53	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	11	12	1	9	0.41	13.18	Short-term on-the-job training
43-5081	Stock clerks and order fillers	34	33	-1	-3	0.52	10.56	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	33	38	5	15	0.55	13.80	Moderate-term on-the-job training
43-6013	Medical secretaries	27	30	3	11	1.33	14.28	Postsecondary vocational award
43-6014	Secretaries, except legal, medical, and executive	80	84	4	5	1.08	12.05	Moderate-term on-the-job training
43-9061	Office clerks, general	96	107	11	11	0.88	10.03	Short-term on-the-job training
45-1099	Supervisors, farming, fishing, and forestry workers	14	15	1	7	6.60	16.26	Work experience in a related field
45-2091	Agricultural equipment operators	11	12	1	9	4.19	8.29	Moderate-term on-the-job training

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	124	141	17	14	4.96	10.87	Short-term on-the-job training
45-2093	Farmworkers, farm and ranch animals	13	15	2	15	3.82	10.34	Short-term on-the-job training
45-4022	Logging equipment operators	20	23	3	15	15.44	9.49	Moderate-term on-the-job training
47-1011	First-line supervisors/managers of construction trades and extraction workers	23	31	8	35	0.66	10.39	Work experience in a related field
47-2031	Carpenters	40	55	15	38	0.76	8.06	Long-term on-the-job training
47-2061	Construction laborers	25	33	8	32	0.53	7.58	Moderate-term on-the-job training
47-2073	Operating engineers and other construction equipment operators	12	15	3	25	0.85	13.04	Moderate-term on-the-job training
47-2111	Electricians	11	14	3	27	0.46	15.46	Long-term on-the-job training
47-2141	Painters, construction and maintenance	15	19	4	27	0.81	9.23	Moderate-term on-the-job training
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	14	17	3	21	0.89	20.29	Work experience in a related field
49-3023	Automotive service technicians and mechanics	30	38	8	27	1.05	10.79	Postsecondary vocational award

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
49-3031	Bus and truck mechanics and diesel engine specialists	12	14	2	17	1.21	12.82	Postsecondary vocational award
49-9042	Maintenance and repair workers, general	46	52	6	13	0.94	13.79	Moderate-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	23	27	4	17	0.99	30.43	Work experience in a related field
51-2092	Team assemblers	69	81	12	17	1.89	16.39	Moderate-term on-the-job training
51-4011	Computer-controlled machine tool operators, metal and plastic	11	16	5	45	2.34	17.23	Moderate-term on-the-job training
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	13	16	3	23	1.75	20.29	Moderate-term on-the-job training
51-4041	Machinists	13	18	5	38	0.94	22.69	Long-term on-the-job training
51-4072	Molding, coremaking, and casting machine setters, operators, and tenders, metal and plastic	39	37	-2	-5	8.45	13.20	Moderate-term on-the-job training
51-4081	Multiple machine tool setters, operators, and tenders, metal and plastic	13	16	3	23	4.32	17.58	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	17	20	3	18	1.09	18.91	Moderate-term on-the-job training
51-9198	Helpers--Production workers	13	15	2	15	0.79	14.39	Short-term on-the-job training

SOC Code	Description	2009 Jobs	2016 Jobs	Change	% Change	Location Quotient	2009 Median Hourly Earnings (\$)	Typical Education & Experience Level
53-3021	Bus drivers, transit and intercity	11	15	4	36	1.48	9.12	Moderate-term on-the-job training
53-3022	Bus drivers, school	25	26	1	4	1.45	8.16	Short-term on-the-job training
53-3031	Driver/sales workers	33	38	5	15	1.60	9.98	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	147	165	18	12	2.27	17.02	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	55	63	8	15	1.39	10.65	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	15	18	3	20	0.72	14.16	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	45	51	6	13	0.55	10.22	Short-term on-the-job training
53-7064	Packers and packagers, hand	18	17	-1	-6	0.69	10.26	Short-term on-the-job training
53-7081	Refuse and recyclable material collectors	81	112	31	38	15.12	11.62	Short-term on-the-job training
		6,158	7,159	1,001	16%		\$12.36	

at least 1.25 greater than \$12.36

Source: EMSI

Appendix B: Businesses by 3-Digit NAICS Codes

Lee County								
Industry	NAICS Code	2003	2008	Average Size	Change		SC % change	US % change
					#	%		
Crop Production	111	8	7	10	-1	-12.5	-11.3	-6.8
Forestry and Logging	113	7	4	12	-3	-42.9	-21.9	-14.7
Support Activities for Agriculture and Forestry	115	6	5	0	-1	-16.7	-3.1	2.8
Specialty Trade Contractors	238	9	10	5	1	11.1	-3.0	11.1
Merchant Wholesalers, Nondurable Goods	424	7	7	5	0	0.0	-11.3	-3.4
Motor Vehicle and Parts Dealers	441	8	6	4	-2	-25.0	-7.7	1.6
Building Material and Garden Equipment and Supplies Dealers	444	5	7	9	2	40.0	-5.4	1.2
Food and Beverage Stores	445	9	7	16	-2	-22.2	-9.7	-0.1
Health and Personal Care Stores	446	4	4	9	0	0.0	16.3	19.9
Gasoline Stations	447	19	16	8	-3	-15.8	-0.3	-2.2
Clothing and Clothing Accessories Stores	448	6	3	5	-3	-50.0	-1.9	5.8
General Merchandise Stores	452	6	5	5	-1	-16.7	18.1	13.0
Truck Transportation	484	14	15	6	1	7.1	-1.6	5.2
Support Activities for Transportation	488	3	3	15	0	0.0	3.4	9.9
Warehousing and Storage	493	4	3	0	-1	-25.0	3.1	18.7
Credit Intermediation and Related Activities	522	11	10	5	-1	-9.1	6.5	16.6
Insurance Carriers and Related Activities	524	5	4	6	-1	-20.0	4.3	5.0
Real Estate	531	5	3	0	-2	-40.0	22.1	18.2
Rental and Leasing Services	532	5	3	0	-2	-40.0	-8.8	1.3
Administrative and Support Services	561	6	2	0	-4	-66.7	10.6	13.9
Waste Management and Remediation Services	562	5	3	0	-2	-40.0	12.3	15.6
Ambulatory Health Care Services	621	7	5	23	-2	-28.6	10.2	12.4
Nursing and Residential Care Facilities	623	5	3	87	-2	-40.0	0.0	9.4
Food Services and Drinking Places	722	16	11	17	-5	-31.3	3.4	11.5
Repair and Maintenance	811	9	12	2	3	33.3	-13.2	-0.9
Personal and Laundry Services	812	4	1	0	-3	-75.0	2.2	7.2
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	5	5	0	0	0.0	18.3	4.1
Private Households	814	16	43	1	27	168.8	21.2	22.1

growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Lee County Employment by Industry Sector

Industry	NAICS code	Employment		2003-2008 Change		Location Quotient	Competitive Effect	2008 Average Annual Wage (\$)	Projected Growth
		2003	2008	#	%				
Total		3,930	3,772	-158	-4.0			29,637	16%

<i>6 star sectors</i>									
Industry	NAICS code	Employment		2003-2008 Change		Location Quotient	Competitive Effect	2008 Average Annual Wage (\$)	Projected Growth
		2003	2008	#	%				
NONE									

<i>5 star sectors</i>									
Industry	NAICS code	Employment		2003-2008 Change		Location Quotient	Competitive Effect	2008 Average Annual Wage (\$)	Projected Growth
		2003	2008	#	%				
Building Material and Garden Equipment and Supplies Dealers	444	40	62	22	55	2.28	20	46,406	A
Health and Personal Care Stores	446	27	34	7	26	1.55	5	30,935	A

<i>4 star sectors</i>									
Industry	NAICS code	Employment		2003-2008 Change		Location Quotient	Competitive Effect	2008 Average Annual Wage (\$)	Projected Growth
		2003	2008	#	%				
Ambulatory Health Care Services	621	84	117	33	39	0.95	18	58,734	BA
Private Households	814	26	42	16	62	3.31	11	7,339	A

3 star or fewer sectors		Employment		2003-2008 Change		Location Quotient	Competitive Effect	2008 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2003	2008	#	%				
Crop Production	111	64	71	7	11	6.06	9	26,322	
Truck Transportation	484	118	85	-33	-28	2.79	-39	31,257	A
Forestry and Logging	113	58	47	-11	-19	34.89	-2	23,193	A
Specialty Trade Contractors	238	47	48	1	2	0.49	-2	21,489	AA
Food and Beverage Stores	445	120	113	-7	-6	1.81	-8	14,952	A
Gasoline Stations	447	134	127	-7	-5	6.90	-2	15,984	A
Credit Intermediation and Related Activities	522	55	50	-5	-9	0.84	-4	29,747	A
Nursing and Residential Care Facilities	623	274	260	-14	-5	3.95	-37	20,740	A
Merchant Wholesalers, Nondurable Goods	424	179	36	-143	-80	0.81	-147	44,267	BA
Warehousing and Storage	493	14	0	-14	-100	-	-18	-	AA
Insurance Carriers and Related Activities	524	25	22	-3	-12	0.47	-3	33,107	BA
Food Services and Drinking Places	722	231	190	-41	-18	0.91	-67	10,033	A
Repair and Maintenance	811	23	22	-1	-4	0.83	-1	26,259	AA
Motor Vehicle and Parts Dealers	441	28	23	-5	-18	0.58	-4	19,859	BA
Clothing and Clothing Accessories Stores	448	28	16	-12	-43	0.50	-15	11,437	BA
General Merchandise Stores	452	33	26	-7	-21	0.39	-10	12,833	BA

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2003-2008 employment growth, 2003-2008 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2003-2008 employment growth of 25 or more, 2003-2008 employment growth rate greater than 0% (overall county jobs declined), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$29,637 (2008 average for all jobs in the county), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county; based on 2008 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



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